

File Edit View Favorites Tools Help	
Back ▾	Go Google ▾
Address <input type="text"/> https://od1.siebel.com/OnDemand/User/ForecastAdm	
CRM OnDemand Search	
<input type="button" value="Contacts"/>	
<input]="" submit]<="" td="" type="button" value="Advanced Search"/>	
Create	
Task	
Appointment	
Contact	
Opportunity	
Account	
Lead	
Service Request	
Solution	

Home	Calendar	Leads	Accounts	Contacts	Opportunities	Forecasts	Reports	Solutions	Service
Forecast Definition Help Tutorial Back									
Forecast Definition Update									
Create Forecast Snapshot Each Week Sunday } 102									
Next Forecast Series Dates									
Forecast Date Δ 11/23/2003 ~ 103 }									
Forecast Series Participants									
Last Name First Name Previous Next									
Phillips Ethan									
Rogers Rick									
Taylor Ryan									
Waller Lisa									
Williams Joan									
All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Previous Next									
Number of records displayed: 25 ▾									

III

FIG. 1

File

Edit

View

Favorites

Tools

Help

Back

▼

ⓧ

Search

☆

Favorites

○

Media

○

ⓧ

Go

Google

▼

Search Web

▼

Search Site

ⓧ

PageRank

○

□

Address

https://od1.siebel.com/OnDemand/User/ForecastAd

Go

SIEBEL

CRM OnDemand

Search

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

Forecast Definition

Help

Tutorial

Back

Contacts

▼

Advanced Search

Submit

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Step 1

Step 2

Step 3

Select your Forecast Snapshot Frequency

Create Forecast Snapshot Each * Week 202

* = Required Field

Next

Cancel

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

Campaigns

Dashboard

Deleted Items

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CRM OnDemand

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Privacy Statement

Internet

201

2/11

FIG. 2

File Edit View Favorites Tools Help	
Back ▾	Forward ▸
Address https://odt.siebel.com/OnDemand/User/ForecastAdm	Go Google ▾
Search Web ▾ Search Site PageRank ○	
CustomerCare Training Admin MySetup Deleted Items Help Sign Out	
Home	Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service
Forecast Definition Help Tutorial Back	
Step 1 Step 2 Step 3	
Previous Next Cancel	
Select your Forecast Snapshot Auto Forecast Date	
Forecast Snapshot Day * Sunday ~ 302	
* = Required Field	
Previous Next Cancel	
Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items	
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Done	

FIG. 3

File Edit View Favorites Tools Help

Back
Forward
Search
Favorites
Media

Address
https://od1.siebel.com/OnDemand/User/ForecastAdmin
Go
Google
Search Web
Deleted Items
Help
Sign Out
PageRank

CRM OnDemand Search

Home
Calendar
Leads
Accounts
Contacts
Opportunities
Forecasts
Reports
Solutions
Service

CustomerCare Training Admin MySetup Deleted Items Help Sign Out

Forecast Definition

Help

Tutorial

Back

Step 1

Step 2

Step 3

Contacts

Advanced Search

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Previous

Finish

Cancel

Company Roles

Field Sales Rep

Service Manager

Service Rep

Forecasting Roles

Executive

Sales & Marketing Manager

Inside Sales Rep

Administrator

402

403

404

Previous

Finish

Cancel

Select the Roles you wish to include in your Forecast. The users related to each role will be the Forecast participants.

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

Campaigns

Dashboard

Deleted Items

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Done

Internet

FIG. 4



Advanced Search

Create

TaskAppointmentContactOpportunityAccountLeadService RequestSolution[Forecast Homepage](#) [Help](#) [Tutorial](#) [Back](#)

To view a forecast, select the appropriate Forecast Date. Automated forecasts must first be defined and scheduled by your administrator before they will be viewable.

[Forecast Homepage](#)

All <u>0</u> <u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> <u>9</u> <u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> <u>I</u> <u>J</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u> <u>O</u> <u>P</u> <u>Q</u> <u>R</u> <u>S</u> <u>T</u> <u>U</u> <u>V</u> <u>W</u> <u>X</u> <u>Y</u> <u>Z</u>										Previous Next	
Status	Forecast Date	Pipeline	Forecast	Closed Revenue	Owner						
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Ethan Phillips	502					
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Joan Williams						
Active	9/21/2003	\$35,450,000.00	\$27,550,000.00	\$1,400,000.00	Ryan Taylor						
Active	9/21/2003	\$10,400,000.00	\$7,200,000.00	\$3,200,000.00	Rick Rogers						
Active	9/21/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips	503					
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/12/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/12/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/12/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips	501					
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/19/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/19/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/19/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips						
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/26/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/26/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/26/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Ethan Phillips						
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Joan Williams						
Active	11/2/2003	\$3,000,000.00	\$3,000,000.00	\$0.00	Ryan Taylor						
Active	11/2/2003	\$5,600,000.00	\$4,550,000.00	\$0.00	Rick Rogers						
Active	11/2/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						

All <u>0</u> <u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> <u>9</u> <u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> <u>I</u> <u>J</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u> <u>O</u> <u>P</u> <u>Q</u> <u>R</u> <u>S</u> <u>T</u> <u>U</u> <u>V</u> <u>W</u> <u>X</u> <u>Y</u> <u>Z</u>										Previous Next	
										Number of records displayed: 25	

FIG. 5

CRM OnDemand Search

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

Forecast Detail Help Tutorial Back

Created for: Joan Williams Create Date: 9/21/2003 Status: Active

Contacts

Advanced Search

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Forecast Summary

Edit

Rollup

Submit Forecast

Unsubmit Forecast

Date	Quota	Closed Revenue	Quota%	Forecast	Best Care	Pipeline	Expected Revenue
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

Team's Summary by Month

Owner Alias	Date	Quota%	Forecast	Closed Revenue	Best Care	Pipeline	Last Updated
ROGERS	7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM
ROGERS	8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM
ROGERS	9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM
RTAYLOR	7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM
RTAYLOR	8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM
Totals			\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00	

Show Full List

All		0-9	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
-----	--	-----	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---

My Opportunities

Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Next Step	Previous
Refresh	9/3/2003	Y	Bay Construction - Std Order - 5 Phoenix 900	Bay Construction	\$400,000.00	6 - Closed/Won	Call
Refresh	9/3/2003	Y	Bay Demolition Services - Std Order - 5 Phoenix 900	Bay Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail
Refresh	9/30/2003	Y	Bobcat Loaders & Excavators - Std Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None
Refresh	8/18/2003	Y	Carter's Rigging & Supply - Std Order - 5 Phoenix 900	Carter's Rigging & Supply	\$400,000.00	6 - Closed/Won	None

FIG. 6

SIEBEL

CRM OnDemand

Search

Contacts

Advanced Search

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Home

Calendar

Leads

Accounts

Contacts

Forecast

Opportunities

Service

Solutions

Deleted Items

Sign Out

CustomerCare

Training

Admin

MySetup

Reports

Solutions

Service

Forecast Edit

Help

Tutorial

Back

Forecast Summary

Save

Cancel

Refresh Totals

Forecast Date	Closed Revenue	Forecast	Best Case	Pipeline	Expected Revenue
7/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

701

FIG. 7

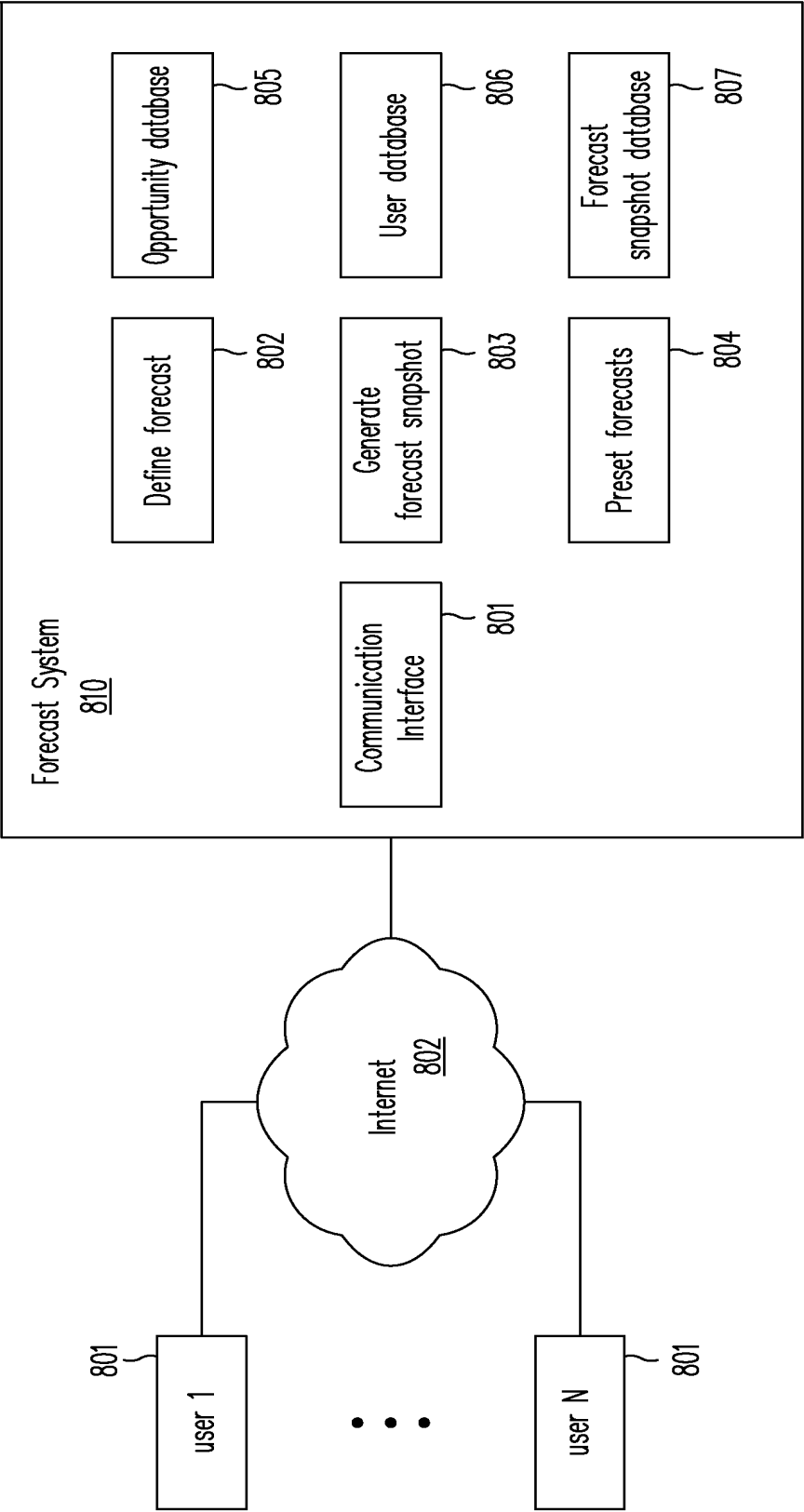


FIG. 8

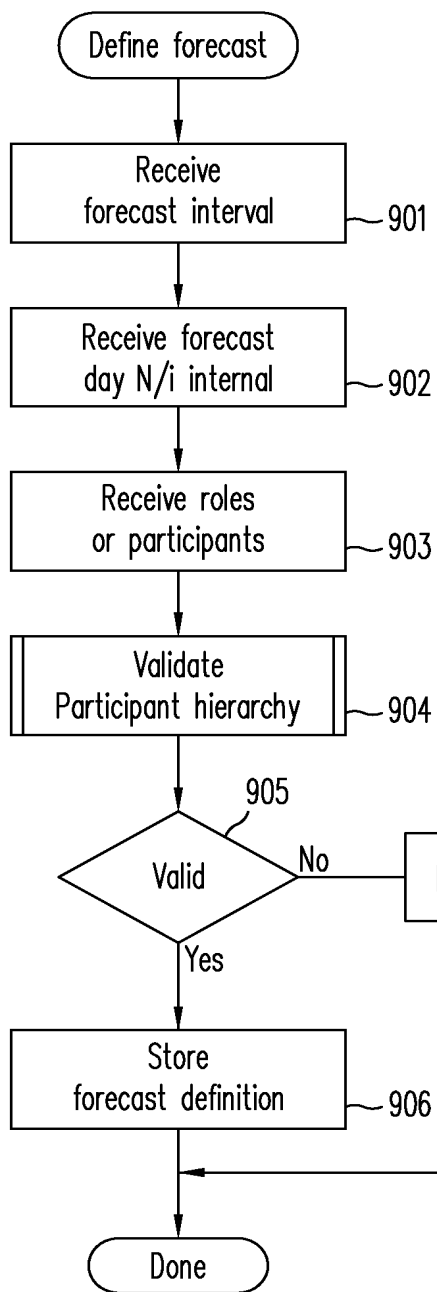


FIG. 9

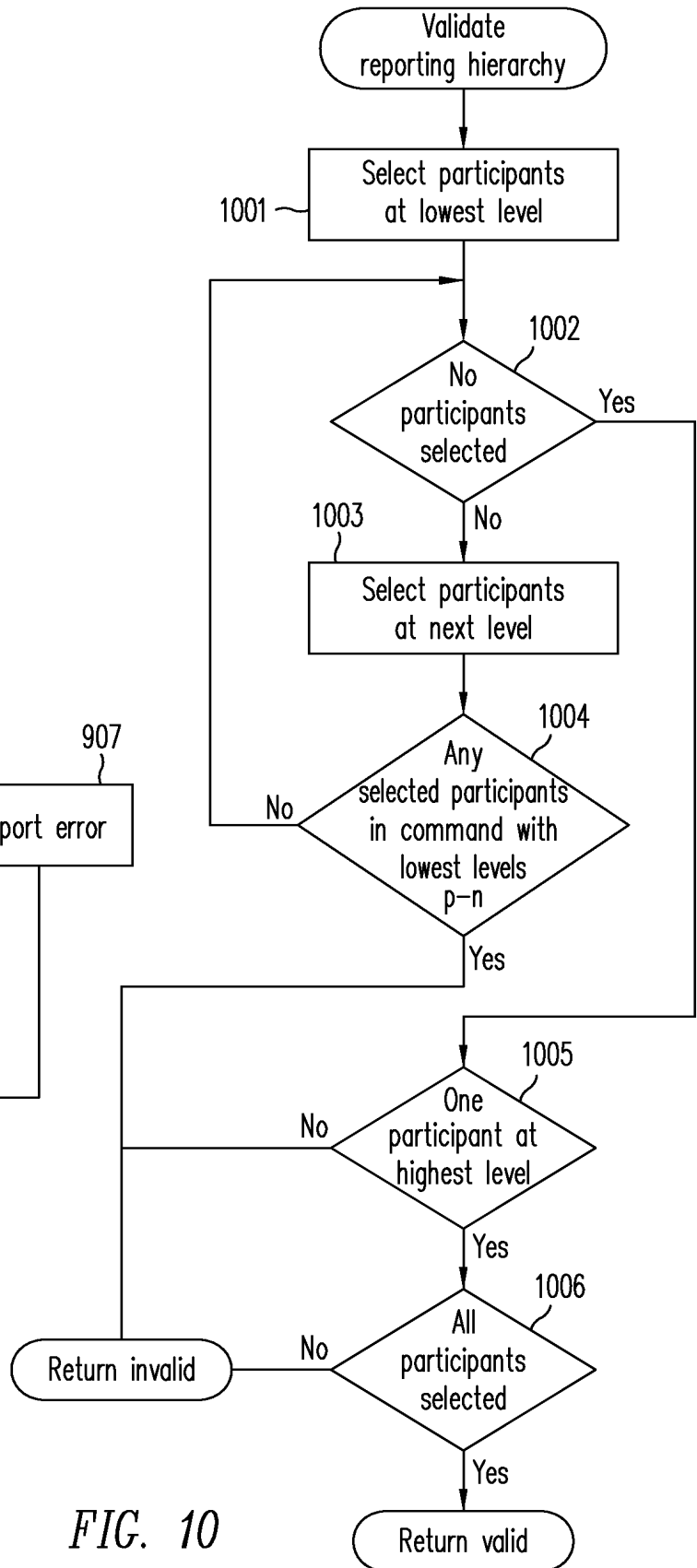


FIG. 10

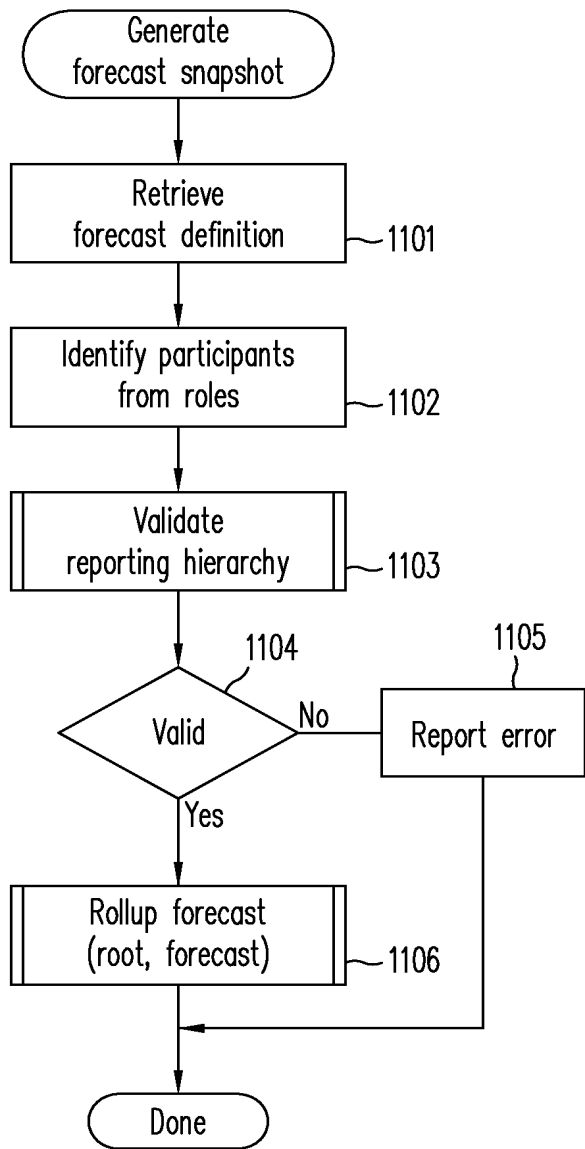


FIG. 11

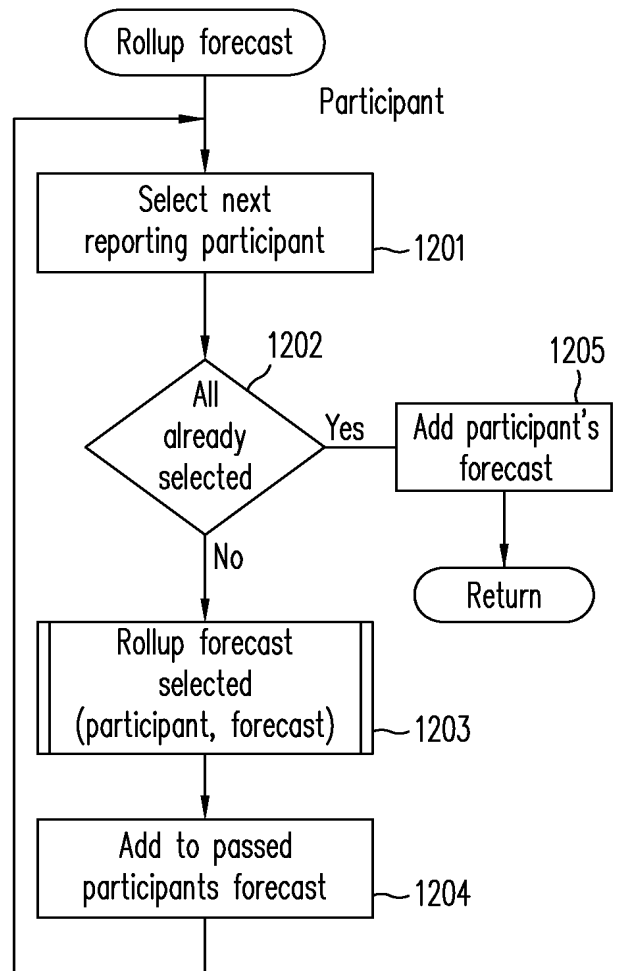


FIG. 12

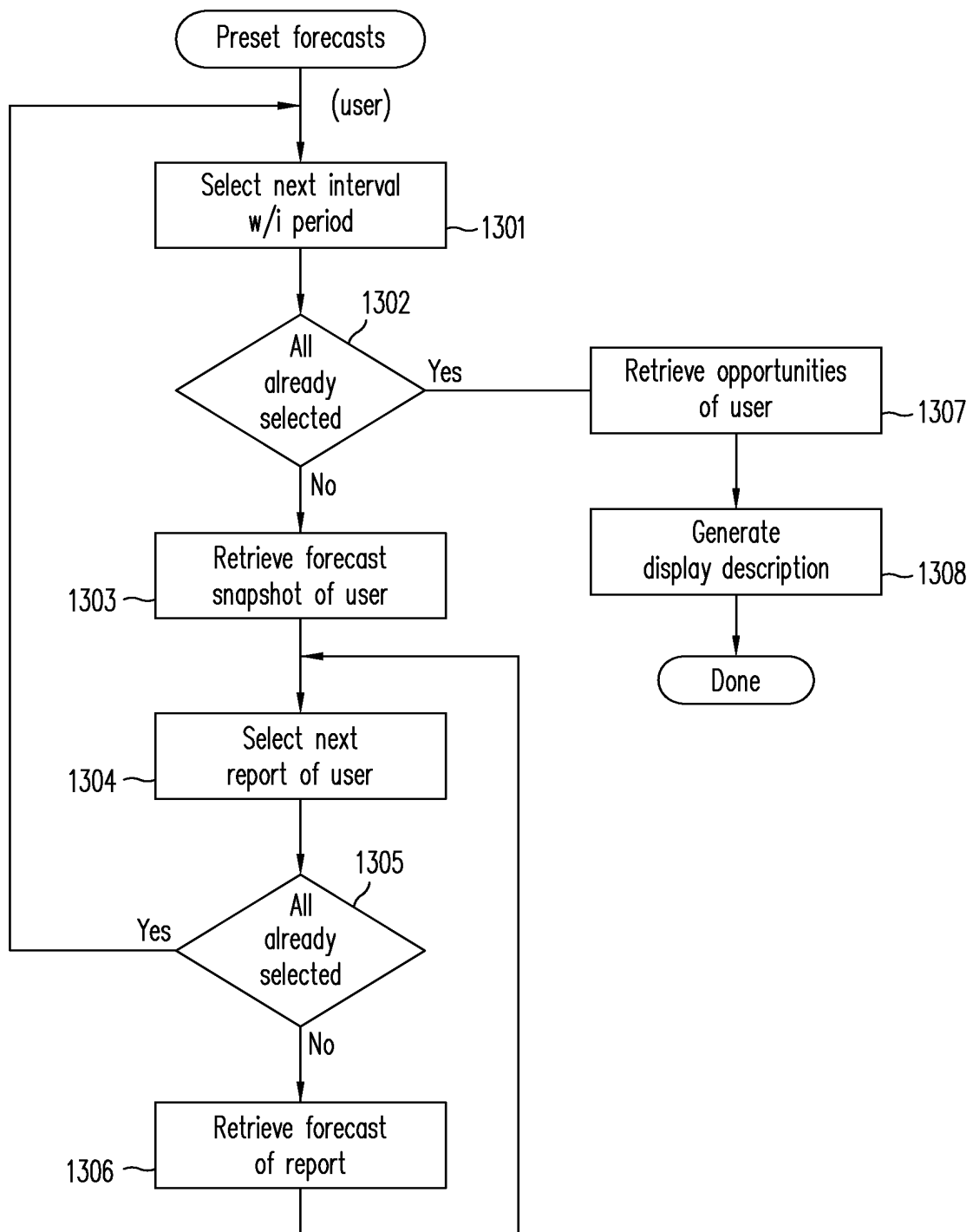


FIG. 13